

The background features a blurred image of a laptop on the left and a stack of several books on the right, all in a light blue color scheme. The text is overlaid on this background.

# **SHELBY**SYSTEMS®

## Advance Your Knowledge

## Webinar Series

### **Tracking Mission Trips in Non-Financials**

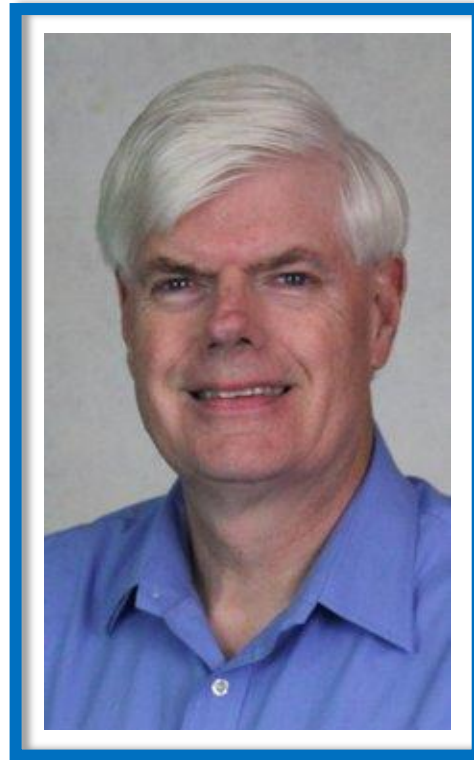
**Welcome**

Please take a moment to locate the Zoom Webinar controls.  
Feel free to say hello or ask a question using the Q & A feature.

# Welcome – Introducing our Panelist

**Ben Lane**

ShelbyNext Trainer



# Charitable Giving or not

Are payments to cover personal or family expenses on short-term mission trips considered charitable giving and reportable on the giving letter or not charitable giving?

**Yes**

or

**No**

If I am paying for someone else?

If I am paying for myself?

This is a very important question for your organization to answer since it determines how you will set up the categories to receive the money.

# Short Term Mission Trip Charitable Giving?

The IRS has determined that participants in a short-term mission trip were not participating for personal benefit (Even if they enjoy mission involvement), but were representatives of the church/organization, thus the payments for the expense of the trip can be considered charitable contributions and can be reported on the giving letter if a "**significant**" portion of the trip is purpose-specific.

Please refer to the [IRS Publication 526, Church and Clergy Tax Guide](#), and the [ECFA website](#) as well as their book called, "[Charitable Giving Guide for Short-Term Mission Trips](#)" for reference and information.

Do not take my word for it, do your research!!!

# Can I designate my gifts to a specific person?

- Since the purpose of my gift is to help to cover my or another person's expenses on the trip, you can identify the person to whom you request your gift could be credited.
- Use soft terms in your publicity. Instead of "we commit or guarantee that this person will get the money" to "we will honor your **request** to provide this gift to reduce the participant's trip cost". ECFA recommends, "Contributions are solicited with the understanding that First Church has complete discretion and control over the use of all donated funds."
- Make sure your church/organization has a written policy on short-term mission trips approved by the appropriate board, committee, or person. It should cover what happens to the gift if the person requested has already received all their funds or does not go on the trip after receiving money. There is an example in the ECFA book.
- Provide template letters of support to the participants to use so that the correct terminology is used. There is an example in the ECFA book.

## Step for tracking the Mission trip

Create the giving category in ChMS (If using ShelbyNext Financials, create the income account in financials and map the category to the account)

Create a fund in On-Line Giving

Link the Fund in Giving to the Category in ChMS

Create a group(s) in ChMS

Create a form in ChMS

Link the form to ChMS with a Workflow

**Publicize the form and start receiving Registrations and payments.**

# Set up the Category in ChMS

- Go to the Gear at the upper right part of the screen and select **Settings** and then select the **Giving** Tab
- Select "Giving Options and Categories" (Unless you renamed Categories)

The screenshot shows the 'Settings' page with the 'Giving' tab selected. The page is divided into two main sections: 'Online Giving Options' and 'Categories'.

**Online Giving Options**

- Turn Off Giving Links In Mobile Apps
- Do Not Show Give Now Link On My Giving Page

**Categories**

To edit a Category, click the gear icon.  
Click and drag the names into the order in which you would like them to appear on the "Input Giving" page.  
Optionally, use the form at the bottom to add new Categories.

**Active Categories**

↓ General Giving	Tax Deductible ⚙
↓ Guatemala Mission Trip - Fall 2022	Tax Deductible ⚙
↓ Tithe 2021	Tax Deductible ⚙

# Set up the Category in ChMS

- Go below the list of categories and type in the new category name
- It will default to Active and Tax Deductible. Open and uncheck the tax-deductible if appropriate. Inactivate after the trip is complete.

The screenshot shows the 'Settings' page in ChMS, specifically the 'Giving' tab. The 'Category Name' field is filled with 'Guatemala Mission Trip - Fall 2022'. Below this, there are two checked checkboxes: 'Active' and 'Tax Deductible'. The 'Active' checkbox has a sub-note: 'Active Categories show up when inputting giving.' At the bottom, there are 'Save' and 'Delete' buttons.

Settings

General Terminology Groups Profile Attendance Check-In Interactions **Giving** Services

Category Name

Guatemala Mission Trip - Fall 2022

Active  
Active Categories show up when inputting giving.

Tax Deductible


Save Delete



# Set up the Category in ChMS

- Map the category to ShelbyNext Financials from the Giving Settings tab and ShelbyNext | Financials Account Sync Settings

## Map Your Categories To Your ShelbyNext | Financials Accounts

Category	ShelbyNext   Financials Bank Account	ShelbyNext   Financials Income Account
General Giving 	1-0-10110 ACB operating checking <a href="#">Choose Account</a>	1-10-40110 Offering-Tithes/pledge <a href="#">Choose Account</a>
Guatemala Mission Trip - Fall 2022	1-0-10110 ACB Operating Checking <a href="#">Choose Account</a>	1-100-41170 Offering-Missions Trips <a href="#">Choose Account</a>

## Set up the fund in On-Line Giving

- Click on Fund Management from the navigation on the left and select Add from the top of the screen
- Some organizations will have a Mission trip Parent fund and the trips as sub-funds
- You could activate the Note/Memo field if you were to allow them to request the money go to a specific individual but it is probably best to let the giving form manage this.

# Set up the fund in On Line Giving

### Add Fund ✕

Parent Fund  
Missions Foreign

Sub-Fund Name  
Guatemala Trip - Fall 2022

Start Date  
06/01/2022

End Date  
10/26/2022

Show note/memo field for this fund ?

Sub-Fund Keyword

Sub-Fund Code

Fund Goal

If fund goal is met:

- Allow the fund to remain active and goal to be exceeded
- Deactivate the fund but allow recurring gifts to continue !
- Deactivate the fund and end all recurring gifts !

Add fund to the following giving form(s)

Hide from Kiosk

Do not sync to ChMS ?

! New funds will not automatically appear on your giving form. Check fund Items within Form Properties to add to your form.

Save Cancel

# Set up the fund in ShelbyNext Giving

- Go to ChMS Integration in Settings to map your funds to ChMS

**Edit Fund Mappings** ✕

**Giving System Fund:**  
Mission Trip Guatemala - Fall 2022

**ShelbyNext Membership Fund:**  
 ▼

**Default Fund:**  
 ▼

# Create the Form

- Registration Form?
- Giving Form?
- Both - 2 separate forms?
- Both – 1 form with both included?
- If the form is multi-purpose, then use the conditional function in the form item settings

# Form Considerations

- Will the trip participants' names be provided in a drop-down list to be selected for payments to their trips or use a text field? If using a drop down, the form would have to be updated when someone registers and is approved.
- Should you use a separate form for each trip or one for all trips?
- Will the form be used for the registration of the team members, collect their payments, and to contribute to another person's trip?
- Use the Email option to confirm registration, notify the team leader or registrations, or provide contribution confirmation
- [Link to Form](#)

# Create the Groups in ChMS

- What kind of groups are needed to manage the trip?
- General trip group for communicating and track attendance for team meetings.
- Groups to track individual team preferences
- Groups to track skills needed for the trip

# Create the Workflow

- Would be best to use one trip per form if using the workflow to sync to ChMS and groups
- Make sure the group names exactly match the selections on the form field selection options to work with the workflow.

The screenshot shows a workflow configuration interface for a form submission. The main title is "Mission Trip Fall 2022". The workflow is currently active, as indicated by the checked "Active" checkbox. The last run was on "Today - 10:24 AM".

The workflow is triggered by a "Form Submission" event. The trigger condition is "When the following form is submitted" and the form selected is "Mission Trip".

The workflow is mapped to a "Group" target. The mapping is as follows:

- Name maps to Full Name
- Address maps to Full Address
- Email maps to Email
- Phone Number maps to Cell Phone

The workflow is configured to "Add the person to" a group. The group selected is "Fall 2022 Mission Trip". The condition for adding the person is "And/Or a group that matches exactly the value selected in this form field:", with the field selected being "What area do you wish to work in?".

At the bottom of the interface, there are buttons for "+ Add Action", "Done", "Save", and "Delete".



# Suggestions for ChMS Record

- Scan the passport picture, medical documents, or any other important documents and place it into Documents
- Use Configurable date and text fields to track important data that would be valuable for this and additional trips, like Passport expiration date.
- Use Interactions to remind trip leaders of significant dates or remind trip members of actions not taken.
- Use Schedules to create teams and positions to help organize the team members for service on the trip.

# Where can I watch this video again?

**Watch or Register to attend  
Webinars**

@ [Community.Shelbysystems.com](https://Community.Shelbysystems.com)

**Now Including Slides to Download**

The screenshot displays the 'Advance Your Knowledge Webinar Series' website. At the top, it says 'Advance Your Knowledge Webinar Series' and 'Register for an Upcoming Webinar'. Below this, there is a table for upcoming webinars:

Webinar Title	Date and Time	Action
Purpose Driven Forms – Part 2 (Giving, Special Events, and Holiday preparations)	10/27/2021 2:00 PM (Central Time)	Register NOW

Below the upcoming webinars, there is a section titled 'Watch a Previous Webinar'. It features a table with columns for 'Click on a Title to Watch NOW' and 'Presented'. Each row includes a title, a date, and a 'Slides' button:

Click on a Title to Watch NOW	Presented	Action
<a href="#">Things You Need To Know Before Year-End for eFiling Your W2s and 1099s</a>	10/20/2021	Slides
<a href="#">Making, Tracking, and Reporting Budgets</a>	09/22/2021	Slides
<a href="#">Purpose Driven Forms – Part 1 (Getting Ready for Fall)</a>	08/11/2021	Slides
<a href="#">A Quick Look at Best Practices for Groups</a>	07/28/2021	Slides

## Next “Advance Your Knowledge” Webinar

# Tracking Credit Card Activity in ShelbyFinancials

**Date: 6/29/22**

**Time: 3pm E/2pm C/12pm P**

**Led by: Carmen Dea and Mark Crain Staff Trainers**

If you have staff who use a company credit card, or even if you have several cards linked to the same account, you could be tracking this in your Financials. You can enter or import transactions from charges made by users. You can reconcile the recorded activity against the statement. You will have a much more accurate assessment of vendor expenses. Find out the mechanics, the tips and tricks, and how it all works inside of your existing Account Payable application if you have ShelbyFinancials.

# Virtual Workshops

## Virtual Workshops for Spring & Summer!!!!

### **101 Financial & ChMS Workshops**

- 4 days of online classroom instruction, 3 hours each day
- Detailed workbooks, quizzes & discussion included!!!
- Lots of great ideas & skill-building lessons

[Click Here to Register](#)

### **201 Financial & ChMS Workshops**

- Beyond the basics, for the customer who is already using Financials or ChMS
- Multiple classes available; sign up for as many as you like!
- Detailed workbooks, quizzes & discussion included!!!

[Now Available!!!](#)

# Resources

Contact links that are provided in this webinar are unique to Shelby Systems. If you are watching this and use one of our sister companies Giving or ChMS products, please connect with your Success Representatives or Support Team.



[Training@shelbyinc.com](mailto:Training@shelbyinc.com)

[MPower University](#)

[MinistryOne](#)